

**2003 SCOTTISH VISITOR ATTRACTION BAROMETER
October 2003 REPORT**

Commissioned by VisitScotland

**Conducted by the Moffat Centre for Travel and Tourism Business Development,
Division of Management, Glasgow Caledonian University**



1.0 INTRODUCTION

The Visitor Attraction Barometer is a monthly review of attractions' performance data. Attraction visitation is considered by geographic location, sector and other key variables. It provides a regular monitor of performance, based on contacting 406 attractions. If you have any comments or suggestions on this report, please contact Norin Arshed (Tel: 0141 331 8410, Fax: 0141 331 8411, E-mail: n.arshed@gcal.ac.uk).

2.0 OCTOBER 2003/2002 AND JANUARY – OCTOBER 2003/2002

Summary

This Barometer compares the period of October 2003 with October 2002. It is based on contacting 406 visitor attractions in Scotland. Some 378 attraction operators provided figures for the month of October 2003, a response rate of 93%. The visitor figures recorded can be compared with data collected in year 2002. No estimated figures have been used for this Barometer to give a more accurate analysis. Where there are less than 4 respondents in any section, no comparative % change will be noted because of low sample size (this is indicated by an asterisk).

The following table shows total visits recorded for October 2003/2002 and Jan-October 2003/2002 as well as the % change calculation.

Attractions	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
378	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

The total number of visits representing the 378 barometer attractions in Scotland for the period October 2003 was **1,433,875**. When compared to comparable data from the previous year of **1,426,201** visits, this shows a visits increase of **0.5%**. When the total visits figure for 2003 of **17,160,254** is compared with year 2002's total visits figure of **16,934,250**, performance for year 2003 shows an increase in visits of **1.3%**. A further breakdown is shown below, where the months of January-October 2003 can be compared with January-October 2002 with their % change calculations.

Attractions	Month	Visits	Month	Visits	% Change
378	Jan-03	626,906	Jan-02	609,286	2.9
	Feb-03	823,810	Feb-02	793,946	3.8
	Mar-03	1,010,138	Mar-02	1,149,043	-12.1
	Apr-03	1,764,887	Apr-02	1,583,523	11.5
	May-03	1,784,939	May-02	1,778,804	0.3
	Jun-03	2,102,400	Jun-02	2,152,398	-2.3
	Jul-03	2,686,522	Jul-02	2,608,375	3.0
	Aug-03	3,173,931	Aug-02	2,984,899	6.3
	Sep-03	1,752,846	Sep-02	1,847,775	-5.1
	Oct-03	1,433,875	Oct-02	1,426,201	0.5

The highest increase in visits recorded by ATB area in October were experienced in the Shetland Islands (22.6%), the Scottish Borders (17.7%) and the Western Isles (11.4%). Greater Glasgow showed the largest decrease in visits during the same period with a decline of -12.2%. Angus and City of Dundee saw a decline on visit figures (-6.8%) with a total of 4,302 less visitors in October 2003. During the month of October 2003 the highest increases in visits were recorded by Distilleries (14.1%), Wildlife/ Zoo/ Safari Park/ Farm (10.9%) and the Garden and the Church/ Abbey/ Cathedral categories with an increase in visits of 10.2%. The Industrial/Craft Premises category saw a decline in visits of -8.2%, followed by the Museum or Art Gallery category with -4.9% and the Historic Heritage Site category experiencing a small decrease of -2.0%.

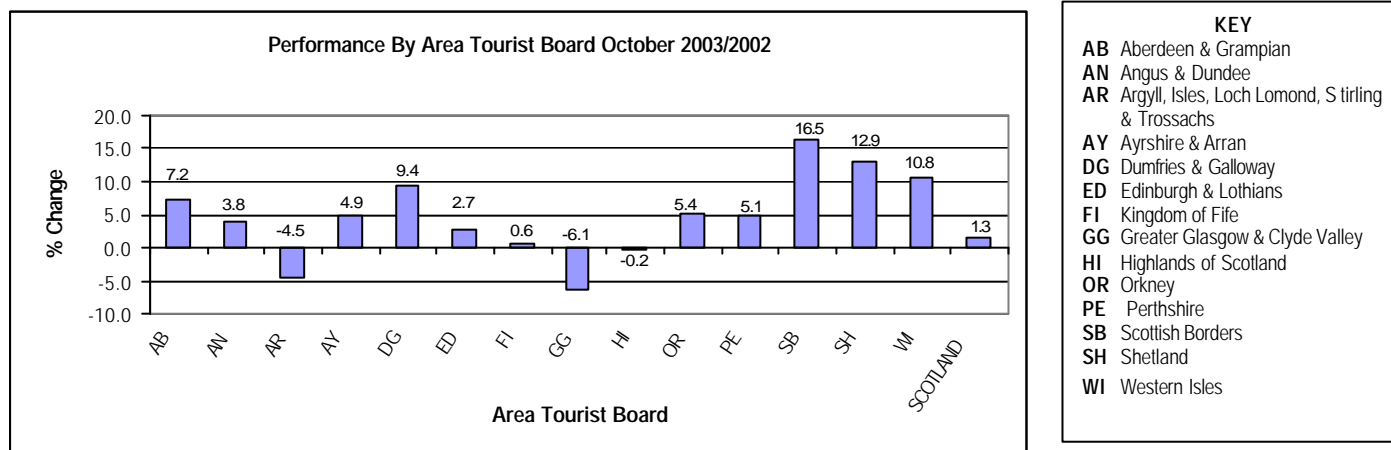
The greatest increases in visits were experienced by attractions located in Seaside areas (24.2%) with decrease in the City areas (-1.6%). Attractions achieving volume of 1-19,999 visits experienced a substantial increase of 20.1%. Free admission attractions for the month of October experienced a decrease of -0.1%, whereas Paid admission attractions experienced an increase of 1.3%. The highest increases in visits by LEC area were experienced by attractions in Skye & Lochalsh (206.0%), Caithness & Sutherland (158.4%) and the Shetlands (22.6%). Lochaber experienced the largest decrease in visits of -29.7%, followed by Ross & Cromarty with -25.6% and Glasgow with -13.8%.

3.0 PERFORMANCE BY AREA TOURIST BOARD

Performance by Area Tourist Board – October 2003/2002 and January-October 2003/2002

ATB Area	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
Aberdeen and Grampian (51)	146,478	136,701	7.2	1,711,192	1,596,033	7.2
Angus and City of Dundee (19)	58,592	62,894	-6.8	642,700	619,179	3.8
ALLST (37)	194,985	194,849	0.1	2,324,605	2,434,978	-4.5
Ayrshire and Arran (14)	75,295	79,724	-5.6	885,148	843,673	4.9
Dumfries and Galloway (34)	44,148	39,987	10.4	606,544	554,391	9.4
Edinburgh and Lothian (43)	358,701	339,440	5.7	4,399,188	4,282,553	2.7
Kingdom of Fife (24)	35,675	37,623	-5.2	530,129	526,772	0.6
Greater Glasgow (40)	241,381	274,885	-12.2	2,569,775	2,737,259	-6.1
Highlands of Scotland (37)	132,947	127,753	4.1	1,577,764	1,580,734	-0.2
Orkney (15)	13,282	12,283	8.1	357,564	339,403	5.4
Perthshire (18)	70,560	67,391	4.7	831,864	791,806	5.1
Scottish Borders (27)	54,204	46,062	17.7	556,499	477,861	16.5
Shetland Islands (13)	2,873	2,343	22.6	83,071	73,579	12.9
Western Isles (6)	4,754	4,266	11.4	84,211	76,029	10.8
SCOTLAND (378)	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

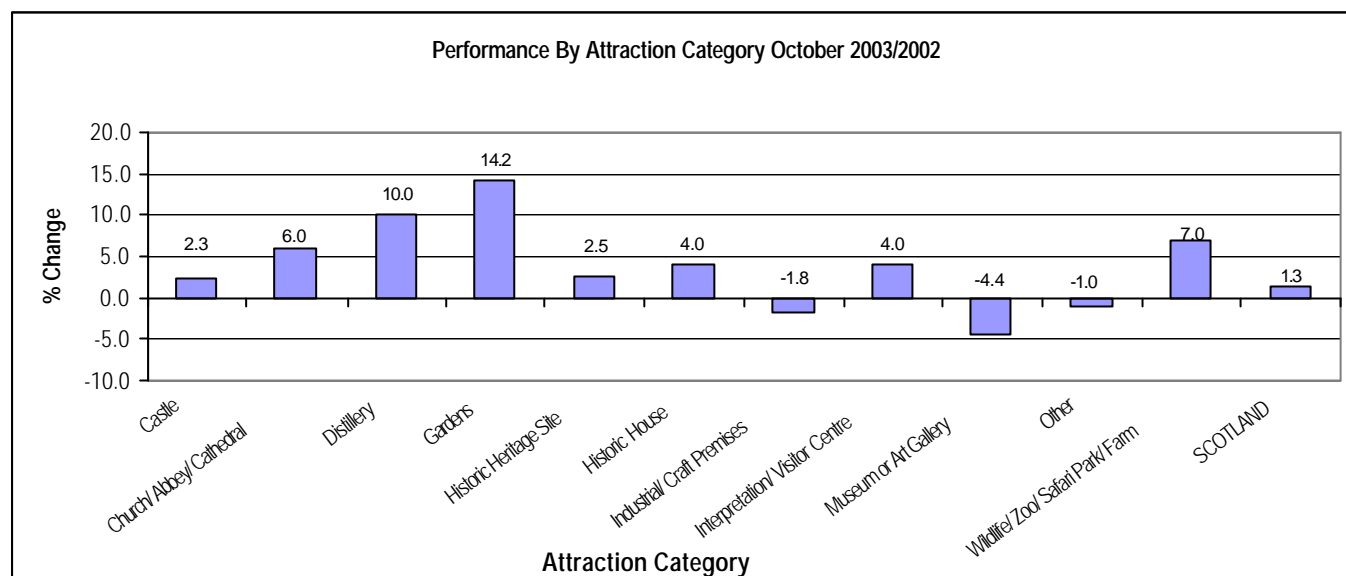
Note: Number in brackets indicates the number of visitor attractions per ATB.


4.0 PERFORMANCE BY ATTRACTION CATEGORY

Performance by Attraction Category – October 2003/2002 and January-October 2003/2002

Attraction category	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
Castle (51)	188,814	186,932	1.0	2,840,394	2,776,240	2.3
Church/ Abbey/ Cathedral (10)	10,185	9,244	10.2	205,793	194,189	6.0
Distillery (13)	36,165	31,700	14.1	391,760	356,008	10.0
Gardens (24)	98,287	89,196	10.2	1,360,061	1,191,249	14.2
Historic Heritage Site (21)	11,959	12,202	-2.0	380,967	371,819	2.5
Historic House (33)	83,465	83,932	-0.6	1,041,827	1,002,197	4.0
Industrial/ Craft Premises (11)	42,067	45,816	-8.2	391,304	398,664	-1.8
Interpretation/ Visitor Centre (59)	241,749	233,433	3.6	2,653,193	2,550,790	4.0
Museum or Art Gallery (115)	490,628	515,737	-4.9	5,166,595	5,406,598	-4.4
Other (30)	165,926	159,754	3.9	1,815,670	1,833,898	-1.0
Wildlife/ Zoo/ Safari Park/ Farm (11)	64,630	58,255	10.9	912,690	852,598	7.0
SCOTLAND (378)	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

Note: Number in brackets indicates the number of visitor attractions per category.



5.0 PERFORMANCE BY LOCATION

Performance by Location – October 2003/2002 and January-October 2003/2002

Location	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
City (65)	700,260	711,957	-1.6	8,025,927	8,096,163	-0.9
Rural (166)	450,711	451,641	-0.2	5,615,901	5,394,553	4.1
Seaside (52)	60,712	48,868	24.2	1,002,613	910,309	10.1
Urban (95)	222,192	213,735	4.0	2,515,813	2,533,225	-0.7
SCOTLAND (378)	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

Note: Number in brackets indicates the number of visitor attractions per location.

6.0 PERFORMANCE BY VOLUME OF VISITS

Performance by Volume of Visits – October 2003/2002 and January-October 2003/2002

Performance of Volume of Visits	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
1 - 19,999 (222)	158,233	131,726	20.1	2,113,305	1,888,665	11.9
20,000 - 49,999 (70)	175,197	169,924	3.1	2,356,964	2,278,330	3.5
50,000 + (86)	1,100,445	1,124,551	-2.1	12,689,985	12,767,255	-0.6
SCOTLAND (378)	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

Note: Number in brackets indicates the number of attractions per range of volume of visits.

7.0 PERFORMANCE BY ADMISSION TYPE

Performance by Admission Type – October 2003/2002 and January-October 2003/2002

Type	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
Free (161)	790,522	791,408	-0.1	8,681,603	8,617,955	0.7
Paid (217)	643,353	634,793	1.3	8,478,651	8,316,295	2.0
SCOTLAND (378)	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

Note: Number in brackets indicates the number of visitor attractions per admission type.

7.0 PERFORMANCE BY LOCAL ENTERPRISE COMPANY (LEC) AREA**Performance by LEC Area – October 2003/2002 and January-October 2003/2002**

LEC Area	Oct-03	Oct-02	% Change	Jan-Oct03	Jan-Oct02	% Change
Argyll & The Islands (14)	39,885	35,562	12.2	489,668	447,303	9.5
Ayrshire (13)	71,910	76,367	-5.8	843,603	807,907	4.4
Borders (27)	54,204	46,062	17.7	556,499	477,861	16.5
Caithness & Sutherland (7)	11,652	4,509	158.4	98,442	77,934	26.3
Dumfries & Galloway (34)	44,148	39,987	10.4	606,544	554,391	9.4
Dunbartonshire (*)	22,702	28,519		243,166	285,967	
Edinburgh & Lothian (43)	358,701	339,440	5.7	4,399,188	4,282,553	2.7
Fife (24)	35,675	37,623	-5.2	530,129	526,772	0.6
Forth Valley (22)	157,706	159,344	-1.0	1,835,637	1,963,411	-6.5
Glasgow (19)	191,676	222,268	-13.8	2,015,742	2,164,185	-6.9
Grampian (39)	95,329	91,595	4.1	1,258,476	1,136,180	10.8
Inverness & Nairn (8)	52,522	54,516	-3.7	723,736	777,069	-6.9
Lanarkshire (12)	20,309	18,177	11.7	227,683	218,530	4.2
Lochaber (7)	23,373	33,240	-29.7	303,054	281,012	7.8
Moray, Badenoch & Strathspey (17)	76,589	67,058	14.2	706,549	743,037	-4.9
Orkney (15)	13,282	12,283	8.1	357,564	339,403	5.4
Renfrewshire (8)	10,601	10,668	-0.6	127,583	115,218	10.7
Ross & Cromarty (6)	5,660	7,643	-25.9	133,214	117,959	12.9
Shetland (13)	2,873	2,343	22.6	83,071	73,579	12.9
Skye & Lochalsh (4)	9,403	3,073	206.0	37,170	35,996	3.3
Tayside (37)	130,921	131,658	-0.6	1,499,325	1,431,954	4.7
Western Isles (6)	4,754	4,266	11.4	84,211	76,029	10.8
SCOTLAND (378)	1,433,875	1,426,201	0.5	17,160,254	16,934,250	1.3

Note: Number in brackets indicates the number of visitor attractions per LEC Area.

9.0 COMMENTS

The following quotes have been drawn from comments made by operators to help epitomise the reasons that have impacted on visitation performance during the period October 2003.

Reasons for positive impacts on visitor figures:-

Prolonged good weather.

The weather was sunnier and drier than normal.

More visitors in October than in September suggest that we are becoming more and more dependent on locals and visitors from Glasgow.

More coaches on autumn runs, increasing the visitor numbers.

Reasons for negative impacts in visitor figures:-

Visitor numbers are down on last year. Due to a different customer mix, revenue stays the same.

Figures down on last year mainly due to the long spell of good weather.

Only partially opened in October due to being a seasonal attraction.

Closed due to seasonal opening times.